PTT Online Training Handout

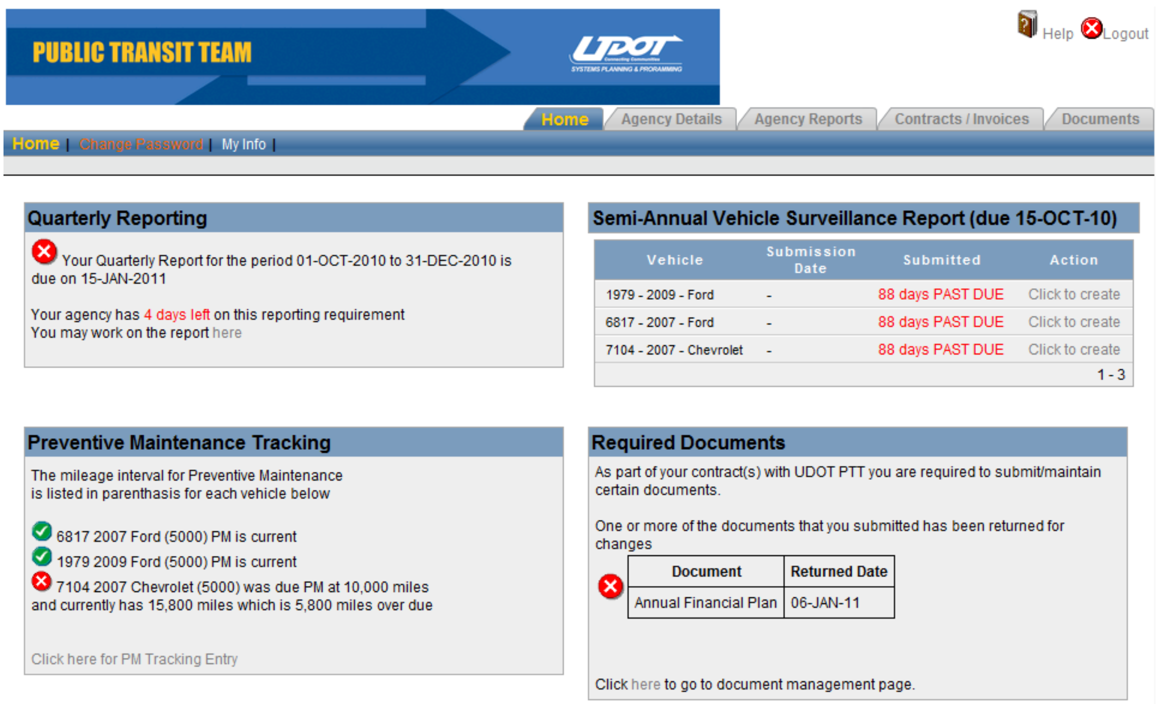
Contents

The purpose of this document is to provide an overview of the Public Transit Team's online application, hereon referred to as **PTT Online**. The logon screen for this secure application can be accessed via a web browser at the following URL https://www.udot.utah.gov/public/ptt.

The PTT Online provides two main functions. First it will allow agencies to submit an application online for FTA Section 5310, 5311, 5316, and 5317 funding. Once an agency has been granted funding, PTT Online will allow the agency to fulfill regulatory reporting requirements online.

Navigating within PTT Online

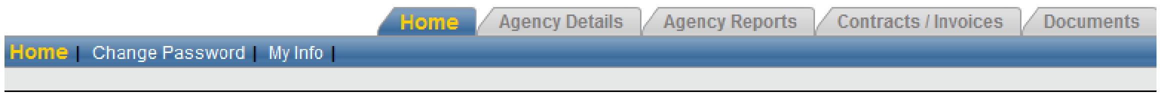
In order for an agency to access PTT Online, they will be given a distinct user name and password that will be used to logon to the application. The above URL will present a logon page where the username and password are entered. Once logged on the user will see their agency home page, seen below.



In the upper right hand corner there are a few navigational icons that will be there on every page of the application. The **Home** icon will return you to this main page.

The **Help** icon will provide context sensitive help on some pages. The **Logout** icon will log you out of the application and return you to the initial logon screen. The **Printer Friendly** icon only shows on report pages and provides a page more suitable for printing.

The tabs at the top of the page will be available on almost every page. They navigate you to the main areas of PTT Online.

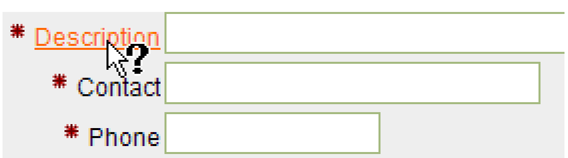


There are two levels of tabs, the top level and the subordinate tabs. The top level tabs, Home, Agency Details, Agency Reporting, Contracts/Invoices and Documents will always be displayed if the user has permissions, and the subordinate tabs will change dependent on the current main tab. In the illustration above the Home tab is the current tab and its subordinate tabs are Home, Change Password and My Info. The Agency Reporting main tab has the largest number of subordinate tabs.

Throughout the application you will also see text which is an active link to

another page. In the illustration above, the text "Click here for Quarterly Reporting" will navigate you to the page where you would submit the quarterly report.

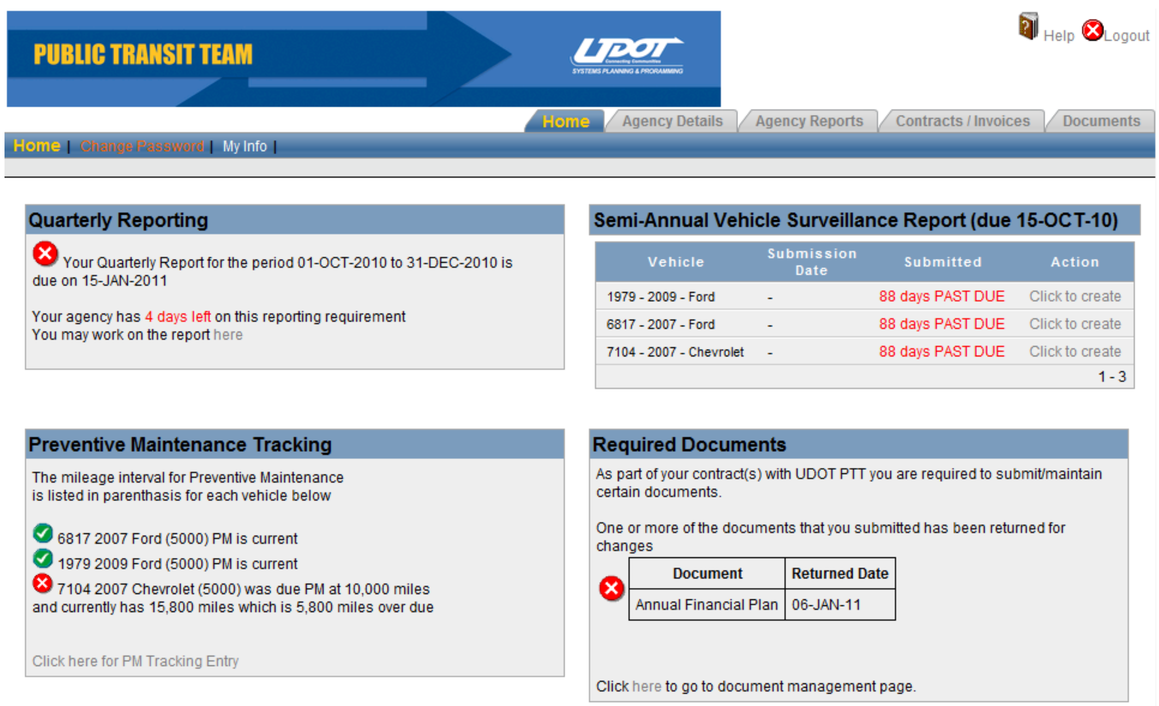
On data entry pages, text entry fields have a label. If the label is an active link, clicking on the link will popup a context sensitive help page for that particular item.



The illustration above shows that the Description label is an active link that will display help for the Description field.

PTT Online Home Page

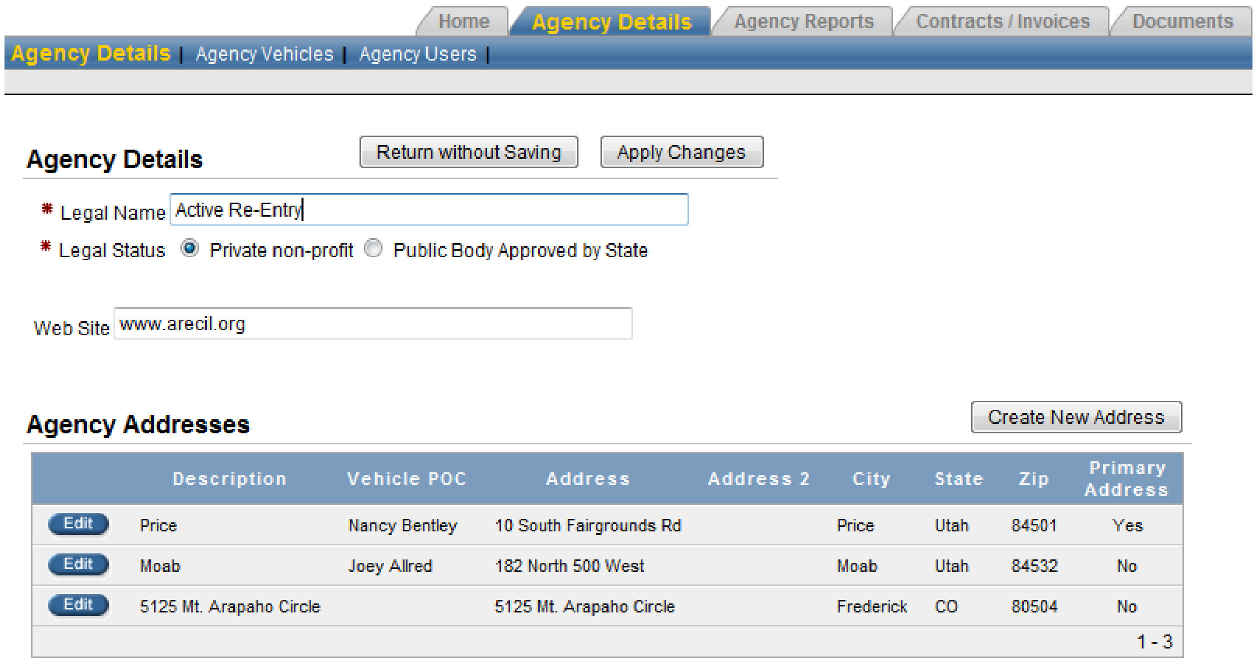
The home page provides you a quick overview of your agency's reporting requirements.



Each region addresses a different area of your reporting requirements. They provide status as to the current reporting requirement (i.e. due, past due, submitted on time, submitted late.) These regions will also provide quick navigation links to help you meet these reporting requirements.

Agency Details

The agency details tab provides you with the ability to maintain certain information about your agency.



Home | Agency Details | Agency Reports | Contracts / Invoices | Documents

Agency Details | Agency Vehicles | Agency Users |

Agency Details Return without Saving | Apply Changes

* Legal Name: Active Re-Entry

* Legal Status: (•) Private non-profit ( ) Public Body Approved by State

Web Site: www.arecil.org

Agency Addresses Create New Address

	Description	Vehicle POC	Address	Address 2	City	State	Zip	Primary Address
Edit	Price	Nancy Bentley	10 South Fairgrounds Rd		Price	Utah	84501	Yes
Edit	Moab	Joey Allred	182 North 500 West		Moab	Utah	84532	No
Edit	5125 Mt. Arapaho Circle		5125 Mt. Arapaho Circle		Frederick	CO	80504	No

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The agency addresses allows you to enter multiple addresses, like your main location, a mailing address, or perhaps a satellite location. To create a new address click the **Create New Address** button in the **Agency Addresses** section at the bottom of the page. This will navigate to a page where you can add an additional address for your agency. When you edit information about your vehicles you will be able to specify at which one of these addresses the vehicle is located.

Agency Vehicles

Clicking on the **Agency Vehicles** subordinate tab under the **Agency Details** tab will take you to a report about your agency's vehicles. This will list all of the vehicles that the Public Transit Team has information about. Vehicles for which UDOT still holds a lien are highlighted in pink. These are the vehicles you will be required to do reports for.

Agency Vehicles

Create

Edit	Bus Name	Make	Fiscal Year	Model Year	VIN	ADA Accessible	Seat Count	Vehicle Length	Lien Release	License Plate	Section	Vehicle Location	Service Vehicle
	4133	Ford	2005	2007	1FDXE45S36DB24133	Yes	12	22			5310	Agency Location	No
	8200	Ford	2003	2004	1FDWE35SX4HA08200	Yes	12				5310	Agency Location	No
	9746	Ford	1997	2000	1FBSS31S6YHA39746	No	15		01-JAN-05		5310	Agency Location	No
	9745	Ford	1997	2000	1FBSS31S4YHA39745	No	15		01-JAN-05		5310	Agency Location	No
	0429	Ford	1993	1995	1FDJE30G1SHB10429	Yes	15		01-JUL-04		5310	Agency Location	No
	6521	Dodge	1989	1990	2B5WB35Z7LK746521	No	15		01-AUG-98		5310	Agency Location	No
	6600	Ford	1987	1988	1FBJS31H6JHC06600	No	15		01-MAY-93		5310	Agency Location	No

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Initially it will not be necessary to enter any information about other vehicles that your agency has that are not already contained in this report. However, if in the future you want to submit an application for more funding, it will be necessary to have information about every vehicle in your fleet.

You may edit certain pieces of information about your vehicles by clicking on edit icon in the far left column. This will navigate you to the vehicle edit page, pictured below.

Edit Vehicle Return without Saving Apply Changes

* Bus Name 1979
Fiscal Year 2008
Model Year 2009
Make Ford
Start Date 04-DEC-08
VIN 1FD4E45SX8DB51979
ADA Accessible Yes
Seat Count 12
Vehicle Length 22'
Lien Release Date
Mileage 2217
Mileage Date 26-MAR-10
License Plate ZA552
Section 5316
Vehicle Location Price
PM Program UDOT PM Program
PM Mileage Interval 5000

Most of the information is self explanatory, but there are a couple of items that need some explanation.

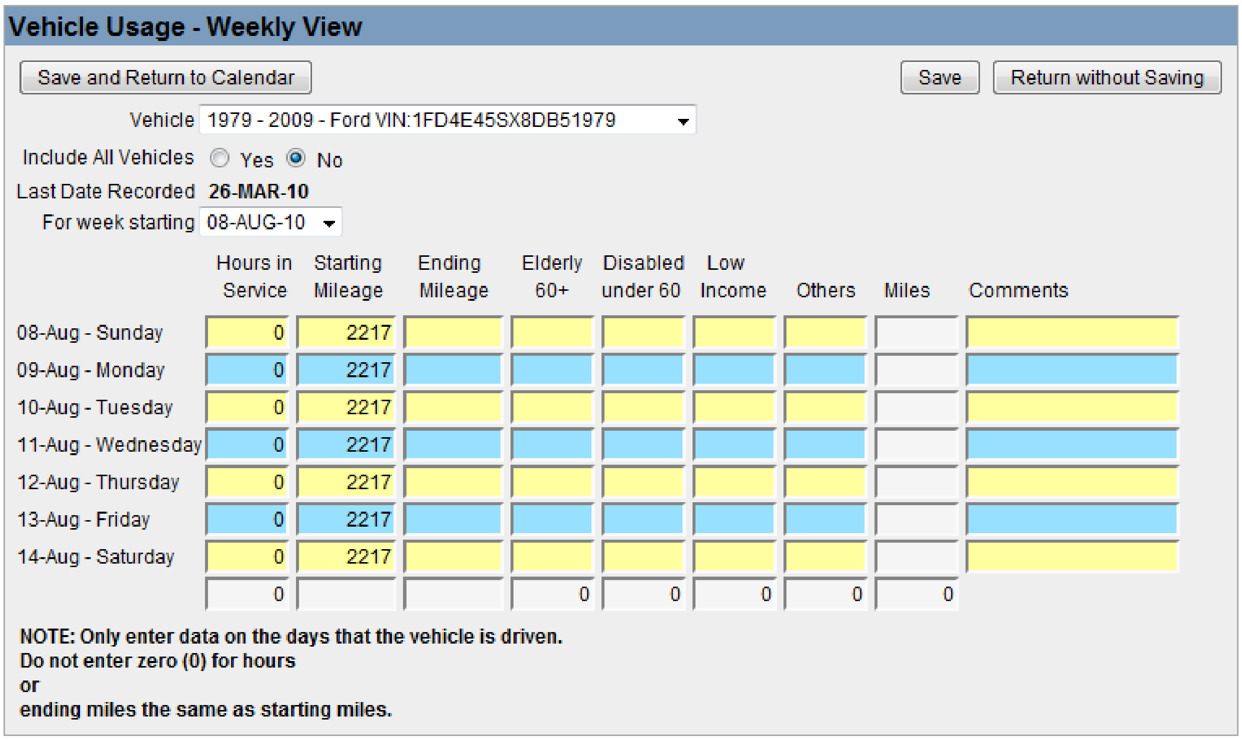
The **Bus Name** field allows you to enter the designation for the vehicle that you are used to using. This could be a bus number or a vehicle name, whatever you would like to use. It is initialized to the last four digits of the VIN. The **Bus Name** will appear in select lists and on reports so you can recognize the vehicle.

The **Mileage** and **Mileage Date** fields will only be editable when they have no value. You need to populate these fields with values for the date that you start recording vehicle usage information, this is the first step you must take in order to start tracking vehicle usage. You will **NOT** be able to enter vehicle usage information until these values have been provided on this page. For instance if you want to start tracking vehicle usage starting on 1 October, enter the vehicles mileage at the start of that day and the date. Once you start tracking vehicle usage these two fields will always display the latest mileage information entered in the vehicle usage.

The **Vehicle Location** field allows you to specify where the vehicle is located. If you only have one location this list of values will only contain “Agency Location”. If you have more than one location this list will include the other locations that you entered through the **Create New Address** button as explained in the **Agency Details** section above.

Vehicle Usage Reporting

Agencies with vehicles purchased with 5310, 5316, or 5317 grant funds will be required to enter weekly vehicle usage data. This data will be used by PTT Online to create part of the required quarterly report. This information is entered through the usage form which is found by clicking on the **Weekly Entry Form** subordinate tab under the **Agency Reporting** main tab.



Vehicle Usage - Weekly View

Save and Return to Calendar | Save | Return without Saving

Vehicle 1979 - 2009 - Ford VIN:1FD4E45SX8DB51979

Include All Vehicles ○ Yes ◉ No

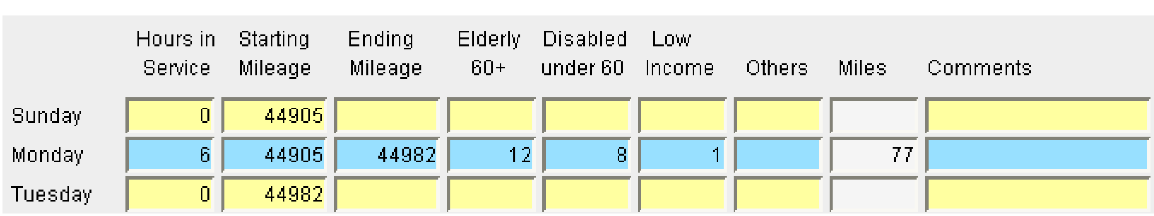
Last Date Recorded **26-MAR-10**

For week starting 08-AUG-10

	Hours in Service	Starting Mileage	Ending Mileage	Elderly 60+	Disabled under 60	Low Income	Others	Miles	Comments
08-Aug - Sunday	0	2217							
09-Aug - Monday	0	2217							
10-Aug - Tuesday	0	2217							
11-Aug - Wednesday	0	2217							
12-Aug - Thursday	0	2217							
13-Aug - Friday	0	2217							
14-Aug - Saturday	0	2217							
	0			0	0	0	0	0	

NOTE: Only enter data on the days that the vehicle is driven.
Do not enter zero (0) for hours
or
ending miles the same as starting miles.

To enter usage information on this page, select a vehicle from the list for the **Vehicle** field, doing so will refresh the page and populate the **Last Date Recorded** field. It will also populate every cell in the **Starting Mileage** column. If the **Starting Mileage** is not populated then you must initialize this value before entering usage information. This was described in the Agency Vehicles section above. You will never be allowed to change the value in the **Starting Mileage** field, it will always be set by the value in the **Ending Mileage** column, so you must enter usage information chronologically.



	Hours in Service	Starting Mileage	Ending Mileage	Elderly 60+	Disabled under 60	Low Income	Others	Miles	Comments
Sunday	0	44905							
Monday	6	44905	44982	12	8	1		77	
Tuesday	0	44982							

All mileage must be recorded, so the starting mileage will always be populated for you.

To enter vehicle activity for the day, enter the number of hours in the **Hours in Service** field. If you desire you can track fractions of hours by entering a decimal number like 5.25 or 0.75. Use your tab button to move to the next field. Tab will take you to the **Ending Mileage** field where you enter your ending mileage. Only use whole numbers for mileage, it is not necessary to enter fractions of miles.

Once you tab out of the **Ending Mileage** field the application will calculate the **Miles** for the day and verify that the result is positive and that the miles driven in the hours entered is a reasonable amount. This will help to keep you from making data entry errors. The next four fields will be the fields for entering counts for the number of one way passenger trips for the day. A one way trip is counted every time a passenger boards the bus. The categories for your passenger trips are:

Elderly 60+

Disabled under 60

Low Income

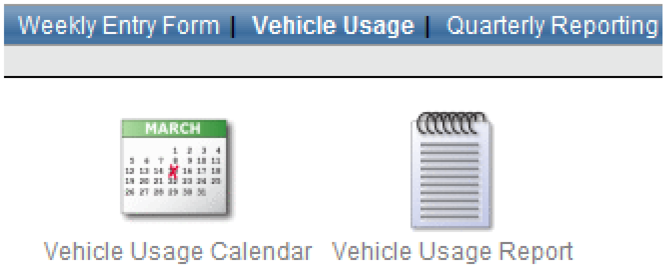
Others

Use the **Comments** field if you have miles in a day, but no passenger trips. For example if one day the bus was only driven to have service done on the vehicle and it was not used for any passenger trips, you would enter a comment stating such. Also use the **Comments** field if you have an entry in the **Others** passenger trip count field, in this case you must comment on why the passengers were allowed to ride, for instance if an attendant accompanied an elderly passenger you would record then under the **Others** trips and note that they where an attendant in the **Comments** field.

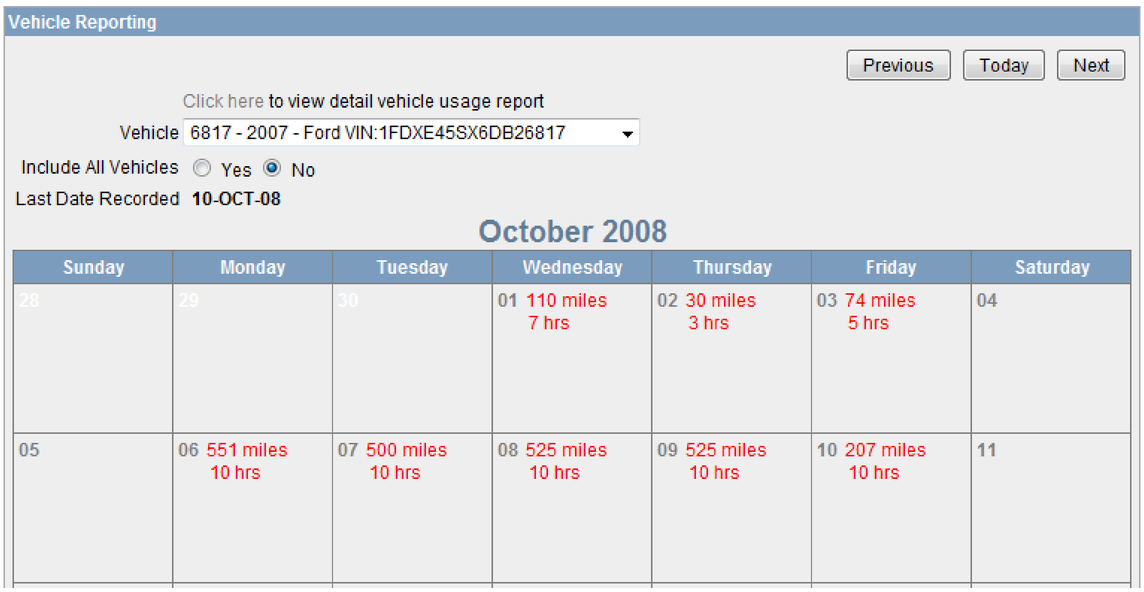
Once you have entered all of the activity for the week, you can press the **Save** button which will save the information that you entered and keep you on the same page so you can select a different vehicle or select a different week. You can enter data for a partial week and return later to the same week for the same vehicle to finish entering data for days beyond the days entered earlier. If you press the **Save and Return** button, it will save the information you have entered and return you to the **Vehicle Usage Calendar**. If you press the **Return without Saving** button it will also return you to the **Vehicle Usage Calendar**, but without saving any of the changes that you made.

Viewing Vehicle Usage

You can view your vehicle usage data by two methods; a calendar and a report. Click on the **Vehicle Usage** sub-tab under the **Agency Reports** main tab to view a menu. Click on either the calendar or report option.



The calendar view will give you a view of a single vehicle's usage for a given month. Use the **Previous** and **Next** buttons to move to the previous and next months.



The report view provides a more flexible method to view vehicle usage. You can specify a **Start Date** and an **End Date** for the report by using the popup calendar button or you can type the date in directly in either the DD-MON-YY, MM/DD/YYYY, or MM/DD/YY date format. The NO option for the **Include All Vehicles** results in a report on only the vehicles that still have a lien, while the YES option will include all defined vehicles for your agency.

Report Parameters

Go

Start Date 03-SEP-08

End Date 02-DEC-08

Include All Vehicles ○ Yes ◉ No

Distinct Service Days **8**

Vehicle Usage

Vehicle	Days Service Provided	Total Miles	Total Trips	60+ Trips	Under 60 ADA Trips	Low Income Trips	Other Trips
6817 - 2007 Ford - 1FDXE45SX6DB26817	8	2522	161	91	30	40	-
report total:	**8**	**2522**	**161**	**91**	**30**	**40**	**0**
							1 - 1

Export to Spreadsheet

Vehicle Usage Detail

Vehicle	Use Date	Hours	Miles	Total Trips	60+ Trips	Under 60 ADA Trips	Low Income Trips	Other Count	Comments
6817 - 2007 Ford - 1FDXE45SX6DB26817	01-OCT-08	7	110	8	5	2	1	-	-
	02-OCT-08	3	30	13	3	5	5	-	-
	03-OCT-08	5	74	10	7	1	2	-	-
	06-OCT-08	10	551	19	12	2	5	-	-
	07-OCT-08	10	500	12	3	5	4	-	-
	08-OCT-08	10	525	28	23	2	3	-	-
	09-OCT-08	10	525	26	13	5	8	-	-
	10-OCT-08	10	207	45	25	8	12	-	-
Vehicle Total:		**65**	**2522**	**161**	**91**	**30**	**40**	**0**	
Vehicle Totals		**65**	**2522**	**161**	**91**	**30**	**40**	**0**	
									1 - 8

Export to Spreadsheet

The top report is a summary by vehicle for the specified date range, while the second report is a day by day report for each vehicle for the specified date range.

Surveillance Inspections

Surveillance Inspections must be done on every vehicle twice a year. You are probably familiar with the paper version which looks similar to the following image.

VEHICLE SURVEILLANCE INSPECTION AND PROGRAM COMPLIANCE REVIEW

Back Home

Inspection Date:

Make:	Vehicle Year:	VIN:	Plate Number:	Odometer:
Documents kept in vehicle (please check if present)	***Registration**	***Insurance Card**	***DMV Inspection Sticker**	

All items must be inspected. If an item is not applicable to this vehicle select NA

Check the appropriate box. **P = Pass F = Fail NA = Not Applicable # = number of days to correct failure**

Exterior	P	F	NA	#	**Safety Equipment**	P	F	NA	#	**Interior**	P	F	NA	#
Body damage					Triangles(3)				1	Mirrors				2
Windows				2	First Aid Kit				2	Lights				3
***2 Outside Mirrors**				**0**	Bloodborne Pathogen Kit				3	Horn				2
Reflector/marker/clearance				2	Seat belt cutter				5	Seats				2
***Turn Signals**				**0**	Extra electrical fuses				5	***Seat Belts**				**0**
***Four Way Flashers**				**0**	Fire Extinguisher				2	AC/Heat/Defroster				2
***Tires front 4/32 rear 2/32**				**0**	Rear door buzzer				3	***Wipers**				**0**
***Headlights high and low**				**0**	Exit windows/buzzers				3	Gauges and Indicators				2
***Parking lights**				**0**	Roof Hatch				3	***Brakes (Foot/Parking)**				**0**
***Brake lights**				**0**	Spare Tire				3	Cleanliness				2
Cleanliness				2						***Air Brake System**				**0**

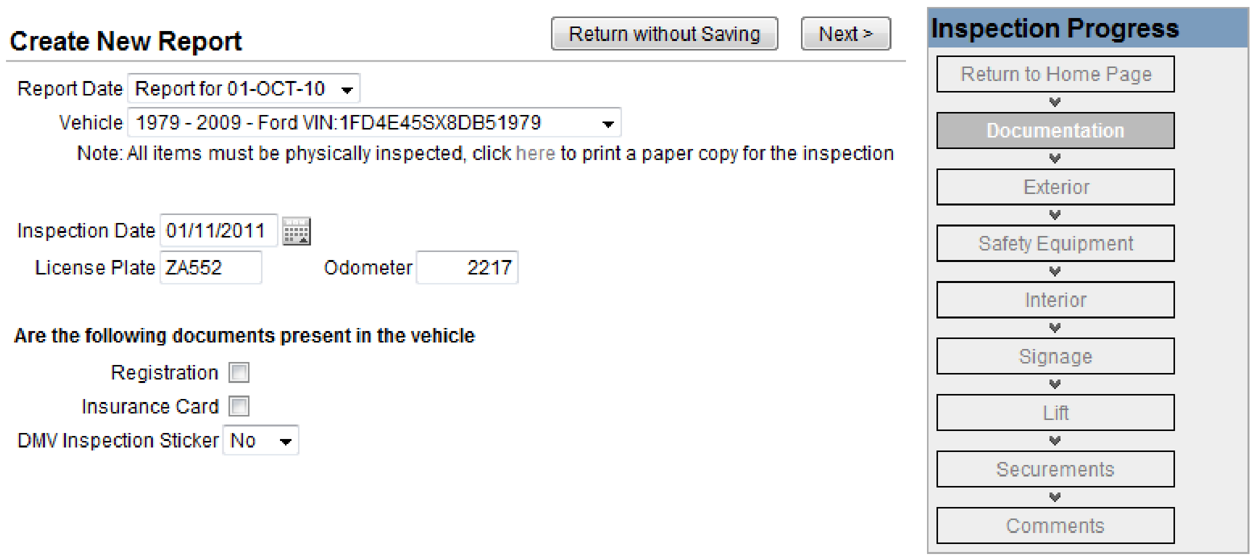
Signage	P	F	NA	#	**Lift**	P	F	NA	#	**Securements**	P	F	NA	#
Buckle Up (or equivalent)				5	***Lift Safety Interlocks**				**0**	***Floor Belts**				**0**
Emergency Exits				3	Level Platform				3	***Lap Belt**				**0**
Lift Operating Instructions				5	Lift Light				1	***Shoulder belt**				**0**
Vehicle Height				5	***Electric Wires (cut, frayed)**				**0**					
					***Hand Pump**				**0**					
					Hand Rails on Lift(2)				1					

Comments and Observations of Inspector:

The above image is a page in the PTT Online that you can print to utilize during the actual inspection. To enter the results into PTT Online and submit the report click on the **Surveillance Inspection** subordinate tab under the **Agency Reporting** main tab. This will navigate you to a page where you can view previously submitted reports and start the process of entering a new report by pressing the **Create New Report** button.

New reports can also be started from your home page. The home page will list the status of all of the current surveillance reports. If they have already been submitted you will be able to view the report or if you started on a report but did not complete the report you will be able to continue the report from the home page or if you have yet to start the report you can do so from the home page.

If you start the report from the home page the reporting period and the vehicle will be selected for you. If you start the process from the **Create New Report** button, you will first have to select a **Report Date** from a list of values, and then you will have to select a **Vehicle** from a list of values. Either way you start the process you will end up on a page that looks like the following.



At this point you could press the Cancel button and nothing will be saved. Notice the “click here” link that will navigate you to an inspection form like the one shown on the previous page that you may print to help with the actual inspection.

Notice the Inspection Progress region on the right hand side of the page. This will keep track of your progress as you move through the process of entering the inspection results. Once you have filled in all the information on each page press the **Next>** button.

After the first page, most of the remaining pages will look like the one below. For each inspection item select the appropriate radio button corresponding to Pass, Fail or NA (not applicable). If an item failed enter the date that the item was fixed.

Exterior Inspection Items

< Previous | Next >

Item				Days	Date Fixed MM/DD/YYYY
***Turn Signals**	Pass	Fail	NA	0	
***Headlights high and low**	Pass	Fail	NA	0	
***2 Outside Mirrors**	Pass	Fail	NA	0	
Body damage	Pass	Fail	NA	-	
Windows	Pass	Fail	NA	2	
***Brake lights**	Pass	Fail	NA	0	
Cleanliness	Pass	Fail	NA	2	
***Four Way Flashers**	Pass	Fail	NA	0	
***Tires front 4/32 rear 2/32**	Pass	Fail	NA	0	
Reflector/marker/clearance	Pass	Fail	NA	2	
***Parking lights**	Pass	Fail	NA	0	

Inspection Progress

- Return to Home Page
- Documentation
- Exterior
- Safety Equipment
- Interior
- Signage
- Lift
- Securements
- Comments

*** Bolded items that fail inspection place the vehicle out of service until the defect is repaired and the Agency Administrator is notified of the repairs.**

**Days = the number of days you have to correct the failure

Note that body damage, depending on severity, should be repaired as soon as possible.

The next to the last page contains a comment box where the inspector can enter notes if they desire. The final page allows you to preview the report prior to submitting it. Only the Agency Administrator user has the permissions to submit the report.

VEHICLE SURVEILLANCE INSPECTION AND PROGRAM COMPLIANCE REVIEW Back | Submit

Active Re-Entry

Inspection Date:11-Jan-2011

Make: Ford	Vehicle Year: 2009	VIN: 1FD4E45SX8DB51979	Plate Number: ZA552	Odometer: 2217
Documents kept in vehicle (please check if present)	***Registration [ ]**	***Insurance Card [ ]**	***DMV Inspection Sticker [ ]**	

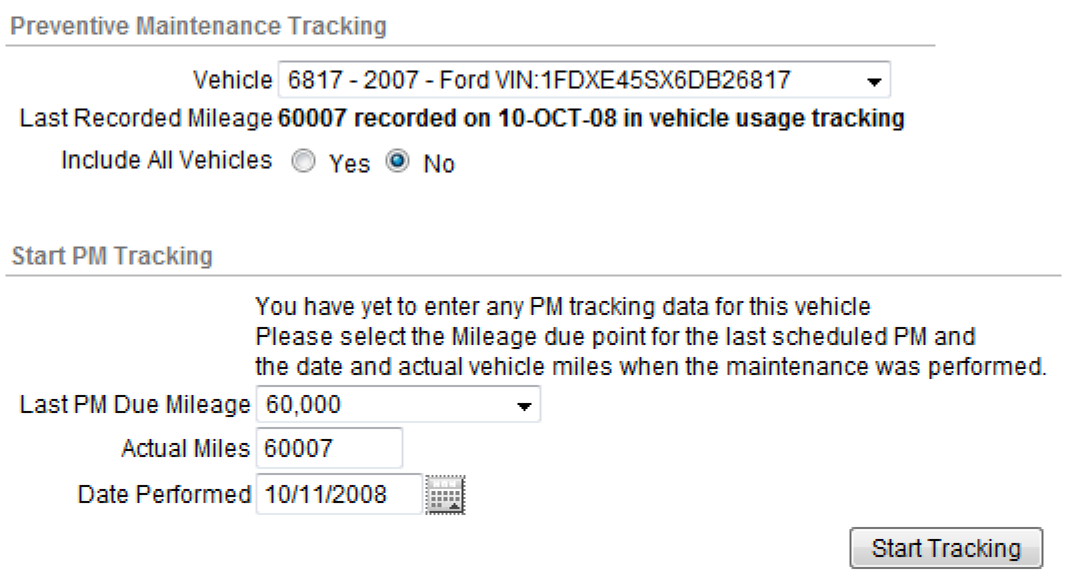
All items must be inspected. If an item is not applicable to this vehicle select NA
Check the appropriate box. **P = Pass F = Fail NA = Not Applicable # = number of days to correct failure**

Exterior	P	F	NA	#	**Safety Equipment**	P	F	NA	#	**Interior**	P	F	NA	#
Body damage	X				Triangles(3)	X			1	Mirrors	X			2
Windows	X			2	First Aid Kit	X			2	Lights	X			3
***2 Outside Mirrors**	X			0	Bloodborne Pathogen Kit	X			3	Horn	X			2

Preventive Maintenance Tracking

You must report Preventive Maintenance (PM) for all vehicles that still have a lien on them. You can track PM for other vehicles if you wish. The **Vehicle** select list will contain only the vehicles with liens when you select NO for the **Include All Vehicles** radio group.

If you perform PM based on UDOTs policies, you will be required to perform PM every 5000 miles. If you have been approved to follow an alternate plan, your mileage interval will be based on that custom plan.



The first time you record PM for a vehicle you will see a page similar to the one above. Select the due mileage for the most recent PM done on the selected vehicle in the **Last PM Due Mileage** field. If you are doing a custom PM schedule this field will be a open field where you can manually enter the mileage point where PM was due. Enter the **Actual Miles** and the **Date Performed** when for when the preventive maintenance was actually performed.

After you have started recording PM for a vehicle you will see an entry screen similar to the one below. If you are following the UDOTs PM schedule the PM mileage due will be listed on the next 5,000 mile interval. Simply record the **Actual Miles** and **Actual Date Performed** for the day the PM service is performed.

Reported Preventive Maintenance

Next PM Due 65,000

Actual Miles

Actual Date Performed DD-MON-YY

Mileage Due	Actual Mileage Done	Actual Date Done
60,000	60,007	11-OCT-08
		1 - 1

Add PM

If you are following a custom PM schedule the Next PM Due will be equal to the actual mileage your last PM was performed plus the interval on which you perform PM.

Reported Preventive Maintenance

Next PM Due 167,735

Actual Miles

Actual Date Performed DD-MON-YY

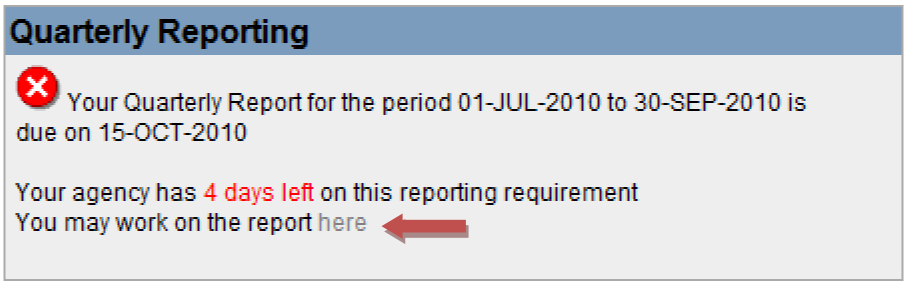
Mileage Due	Actual Mileage Done	Actual Date Done
163,750	163,735	30-APR-08
		1 - 1

Add PM

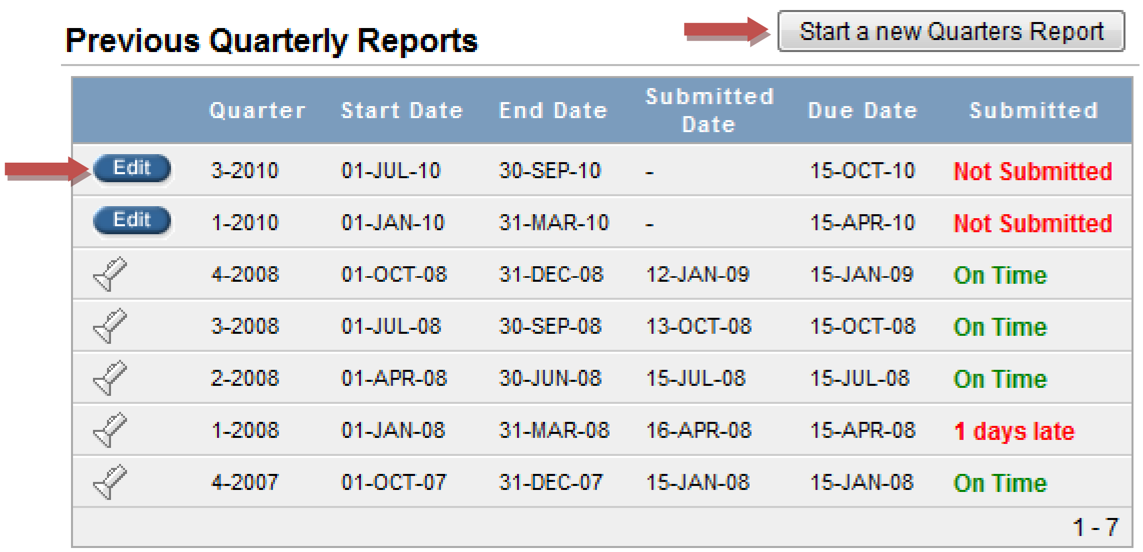
It is important to perform PM as close to the scheduled mileage as possible. Your consistency in accurately performing on schedule PM will be a measurement used in evaluating your agency when you apply for further funding.

Agency Quarterly Report Submission

As with previous quarterly reports, agencies will be notified on their home page about upcoming quarterly reporting requirements. The notification will include a link to the reporting page as seen below, or they can navigate there via the Quarterly Reporting sub tab under the Agency Reports main tab.



The Quarterly Reporting main page is a report of Previous Quarterly reports either started or submitted. If your agency has not started the current quarters report you do so by clicking on the Start **a new Quarters Report** button. If you have started a report but have yet to submit the report, you can continue by clicking on the **Edit** button in the report.



	Quarter	Start Date	End Date	Submitted Date	Due Date	Submitted
Edit	3-2010	01-JUL-10	30-SEP-10	-	15-OCT-10	Not Submitted
Edit	1-2010	01-JAN-10	31-MAR-10	-	15-APR-10	Not Submitted
	4-2008	01-OCT-08	31-DEC-08	12-JAN-09	15-JAN-09	On Time
	3-2008	01-JUL-08	30-SEP-08	13-OCT-08	15-OCT-08	On Time
	2-2008	01-APR-08	30-JUN-08	15-JUL-08	15-JUL-08	On Time
	1-2008	01-JAN-08	31-MAR-08	16-APR-08	15-APR-08	1 days late
	4-2007	01-OCT-07	31-DEC-07	15-JAN-08	15-JAN-08	On Time

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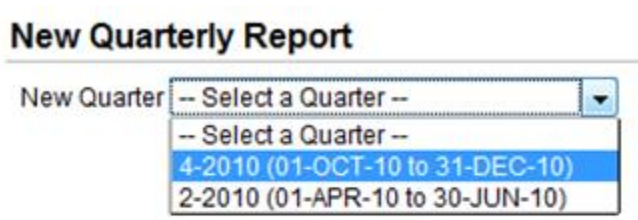
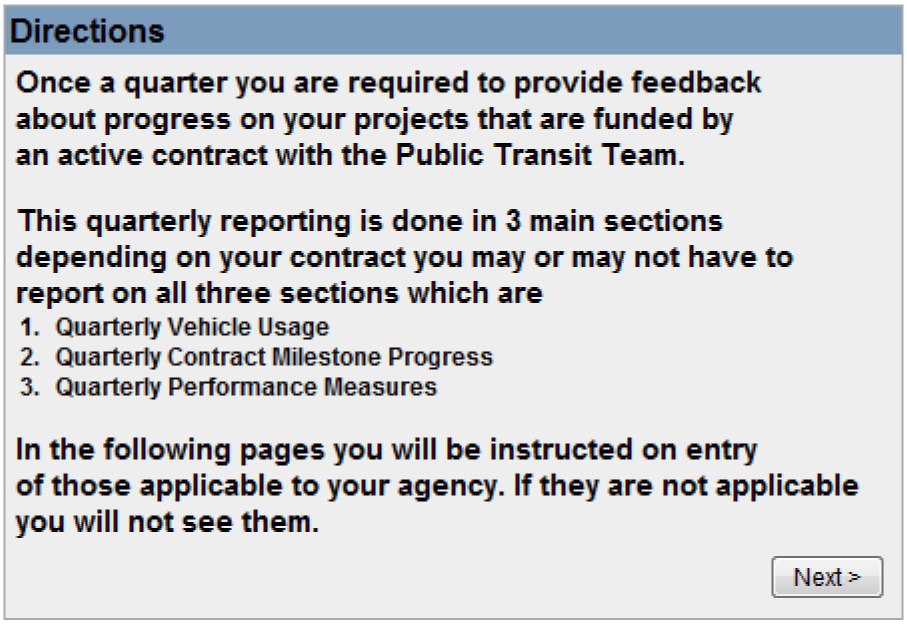
When the you start a new report the first step will be to select the quarter for the report. The only options available will be past reports not submitted in the past year and the current reporting period.



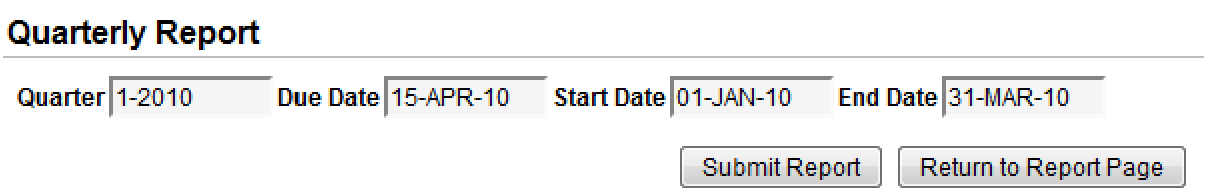
While you can start a quarterly report during the reporting period, you will be unable to submit the report until after the end of the reporting period. For example in October 2010 you could start on the 4-2010 quarterly report, but you will not be able to submit the report until 1 January 2011, the day after the end date for the reporting period 1-Oct-10 to 31-Dec-10.

After selecting a new quarter or after clicking on the Edit button for an existing but unsubmitted report you will first see the following instructions page.



The next page is the overall report status page. It displays every section that is applicable to your agency. Nothing is editable on this page, it only serves as an overview and provides navigation to the pages where actual changes will be made.

The first section you will see is the date section. This provides the dates for the report. Also included in this section will be a **Return to Report Page** button and if applicable a **Submit Report** button.



The submit button is only shown when the report has been completed, the current date is past the report end date and the current user is an Agency Administrator user which is the only user authorized to submit the report.

Return Notes

The next section you will see is the **Notes from the Public Transit Team** section if the report has been returned for corrections. This section will only show up if the report has been submitted, subsequently reviewed and then returned to the agency for corrections.

Notes from Public Transit Team when returned

Comments	Date Returned	Date Originally Submitted
7 of your vehicles have no vehicle usage recorded for the reporting period. Please enter the usage and then resubmit the report.	01-SEP-10	01-SEP-10
Try again, 7 vehicles need use data	27-AUG-10	27-AUG-10
8 of your vehicles have no vehicle usage recorded for the reporting period. Please enter the usage and then resubmit the report.	27-AUG-10	27-AUG-10
		1 - 3

All of the remaining report regions contain individual reporting requirements. The status of each requirement is displayed with an icon

Means the requirement has not been met

Means the requirement has been met

The report's submit button will not be displayed until ALL reporting requirements have been met.

Required Invoices

The next section is the **Required Invoices** section. This section will only be shown if your agency has a current contract that has a contract line item whose Fund type is either Operating or Project Administration.

Required Invoices

You have contracts which require the submission of an invoice AT LEAST once a quarter
You may do so by clicking on the Contracts / Invoices main tab

Contract	Line Number	Description	
098512	3	Aide assistance on Vans	

No direct action for required invoices can be taken from the quarterly report submission page. The user is directed to use the Contracts / Invoices main tab to submit invoices. If the agency has multiple contracts, say two contracts each having an Operating line item, submitting an invoice against one of the contracts will satisfy the reporting requirement for both, since they are both Operating.

Vehicle Utilization

The next section is vehicle utilization. This section is the content of the previous 5310 quarterly reports. This section will only appear if your agency has a current section 5310, 5316, or 5317 vehicle that is not a support vehicle and does not have a lien release date. There is a slightly different region for 5311, description to follow this one.

Vehicle Utilization

Vehicle Utilization

Edit Vehicle Utilization

Total Days in Service	12
Total Hours Driven	67
One way trips for Elderly	106
One way trips for disabled < 60	161
One way trips for low income	195
Operating Costs	$21,250.00
Denial Total	
Denial Reason	

	Year	Make	VIN	Mileage	Mileage Date	Miles In Quarter	
HV#9	2007	Ford	1FDXE45S77DA56324	37288	31-MAR-10	505	
HV# 15	2007	Ford	IFDXE45S27DB47632	8525	24-MAR-10	106	
HV# 12	2009	Ford	1FD4E45S48DB51900				⚠
HV# 14	2007	Ford	1FDXE45S57DB47608				⚠
HV# 11	2009	Ford	1FD4E45S68DB57214				⚠
HV#10	2007	Ford	1FDXE45SX7DB47605				⚠
HV#7	2007	Ford	1FDXE45S67DA56315				⚠
HV#8	2007	Ford	1FDXE45S97DA51626				⚠
HV# 13	2009	Ford	1FD4E45S18DB51904				⚠

⚠ 7 of your vehicle(s) have no usage reporting for the last 10 days of the reporting period. Click on the warning symbol next to each vehicle to navigate to the vehicle useage form.

All of the vehicle usage data is calculated by the daily vehicle usage entries. In order to eliminate reports being submitted prior to all of the usage data being recorded warnings icons will be displayed next to each vehicle that does not have any reporting for the last 10 days of the reporting period. This will not stop you from submitting the report, but it does bring it to your attention.

To edit the three pieces that require user input, click on the **Edit Vehicle Utilization** button. This will navigate you to the input/edit form. The only required piece of information is the Operating costs.

Agency Inputs for Quarterly Vehicle Usage Reporting

Return without saving | Update

* Operating Costs: 21250

Denial Total:

Denial Reason:

Agencies with section 5311 vehicles will see a different Vehicle Utilization section.

5311 Vehicle Usage

Vehicle Utilization

Edit Vehicle Utilization

	Year	Make	VIN	Total Actual Mileage	Miles In Quarter	Passenger Trips In Quarter	
640	1997	Gillig	15GCB2010V1088313	237,123	4,512	12,345	
641	1997	Gillig	15GBC2012V1088314	183,123	2,123	4,567	
653	2002	Gillig	15GGB221421072237	198,123	3,456	5,678	
654	2002	Gillig	15GGB221621072238	166,123	2,345	1,234	
655	2002	Gillig	15GGB221821072239	56,123	1,589	987	
656	2002	Gillig	15GGB221421072240	66,123	3,210	765	
657	2004	Gillig	15GGB291941074350	111,123	953	91	
658	2004	Gillig	15GGB291041074351	195,123	850	456	
659	2004	Gillig	15GGB291241074352	186,123			⚠
660	2004	Gillig	15GGB291441074353	74,123	3,210	3,698	
				Totals			

⚠ 1 of your vehicle(s) have no usage data entered. Click on the Edit Vehicle Utilization button above to navigate to the vehicle useage form.

All of the agencies active 5311 vehicles will be listed. You will have to provide the total mileage on the vehicle for the entire life of the vehicle and the miles each vehicle was driven during the quarter. To edit the data for all of the vehicles, click on the **Edit Vehicle Utilization** button. This will navigate you to the input/edit form.

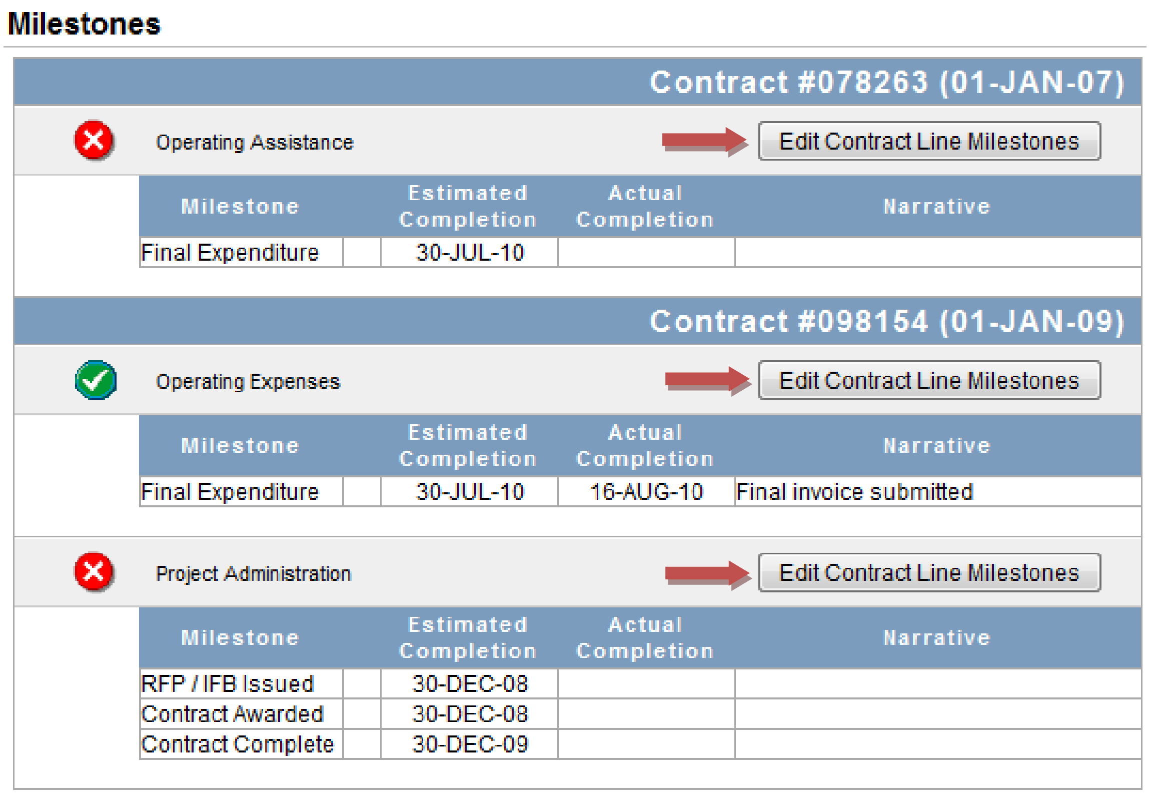
5311 Vehicle Usage for Quarter ending 31-DEC-10

Return without saving | Save

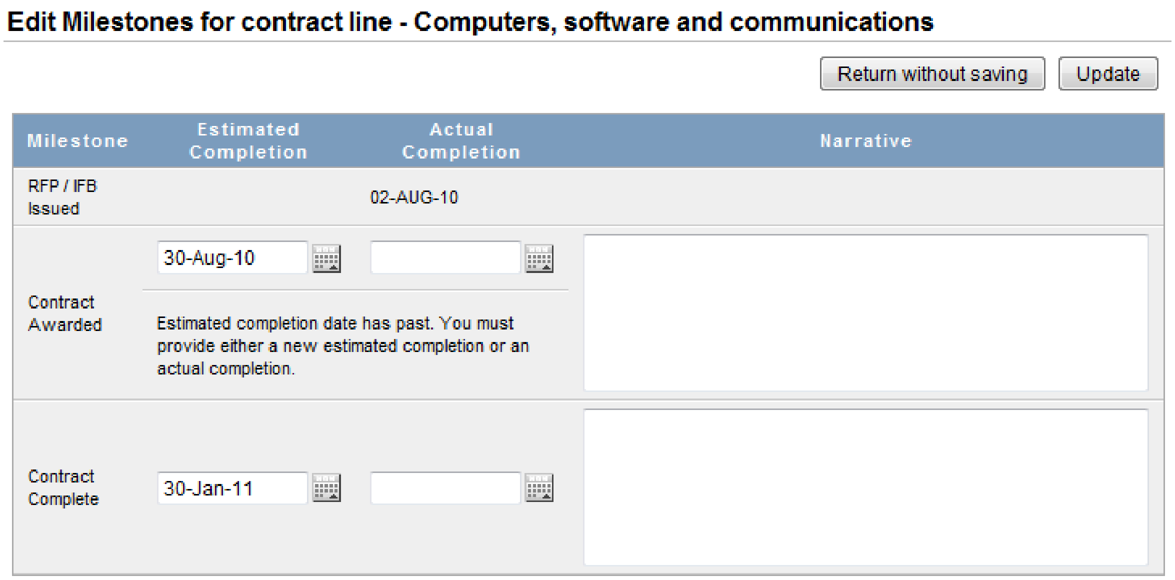
Vehicle	Model Year	Make	VIN	Total Actual Mileage	Miles In Quarter
653	2002	Gillig	15GGB221421072237		
654	2002	Gillig	15GGB221621072238		
655	2002	Gillig	15GGB221821072239		
656	2002	Gillig	15GGB221421072240		
657	2004	Gillig	15GGB291941074350		
658	2004	Gillig	15GGB291041074351		
659	2004	Gillig	15GGB291241074352		
660	2004	Gillig	15GGB291441074353		
					1 - 8

Milestone Reporting

The next region shown will be the Milestones region. This region will only display your agency is required to report on contract milestones, otherwise you will not see this section.



As you can see by the example above that the Milestones are grouped by contract and listed by contract line items. Each contract line item will have the indicator icon showing the status of the milestone reporting for that line item. Additionally each will have an **Edit Contract Line Milestones** button that will navigate you to the page where you can enter your response.



As seen in the example above, when an estimated completion date has passed, a comment will be displayed and you will be required to enter a new estimated completion date or an actual completion date. Regardless of the dates you will be required to provide a narrative for at least one of the milestones. Additional guidance will be seen on the right side of the page to provide assistance for the content of the narrative.

Narrative Guidance

In the narrative provide:

- Description of project status, problems encountered in implementation, specification preparation, bid solicitation, resolution of protests, and contract awards
- Detailed discussion of all budget or schedule changes
- With revised estimated completion dates when original estimated completion dates are not met provide:
  - Explanation of why scheduled milestones or completion dates were not met
  - Identification of problem areas
  - Narrative on how the problems will be solved
- For "Final Expenditure" milestones
  - Total % of funds expended
  - Highlights for report period

When the source for a contract line is a considered for construction, additional instructions will be provided for narrative content.

Detailed Instructions for Construction Narratives

The FTA requires more in depth narratives for large construction projects. In your narrative you should include:

Analysis of significant project cost variances using quantitative measures, such as hours worked, sections completed, or units delivered. Discussion of completion and acceptance of equipment and construction or other work, together with a breakout of the costs incurred and those costs required to complete the project.

A list of all outstanding claims exceeding $100,000, and all claims settled during the reporting period accompanied by a brief description, estimated costs, and the reasons for the claims

A list and brief description of all potential and executed change orders and amounts exceeding $100,000, pending or settled, during the reporting period

As seen in the illustration below, any previously completed milestones will be listed with their completion date, but they will not be editable. In this example **the RFP/IFB Issued** milestone had been reported as completed in a previous quarterly report.

Edit Milestones for contract line - Computers, software and communications

Return without saving | Update

Milestone	Estimated Completion	Actual Completion	Narrative
RFP / IFB Issued		02-AUG-10	
Contract Awarded	30-Aug-10 Estimated completion date has past. You must provide either a new estimated completion or an actual completion.		
Contract Complete	30-Jan-11		

Performance Measure Reporting

The final section that you may see is the Performance Measures region. This region will only be displayed if your agency is required to report Performance Measures for an active contract. Like the Milestones, Performance Measures are grouped by contract and listed by contract line item. Each contract line item will have the indicator icon showing the status of the Performance Measure reporting for that line item. Additionally each will have an **Edit Contract Line Measures** button that will navigate you to the page where you can enter your response.

Performance Measures

Contract #098512 (03-FEB-09)

Aide assistance on Vans — Edit Contract Line Measures

Milestone	Response
Number of customer contacts	1358
Number of one-way trips	1125
Identify targeted passenger demographics	elderly and people of low income needing assistance.......
Lessons learned	This is the box for the lessons learned for this reporting period.

The edit page for the performance measure displays the prompt for each measure providing a small field for numeric measures and a text box for narrative measure types. If help text was defined for the performance measure, a help icon will be present allowing the user to click on it for a popup with the additional instructions.

Edit Performance Measures for contract line - Aide assistance on Vans

Return without saving | Update

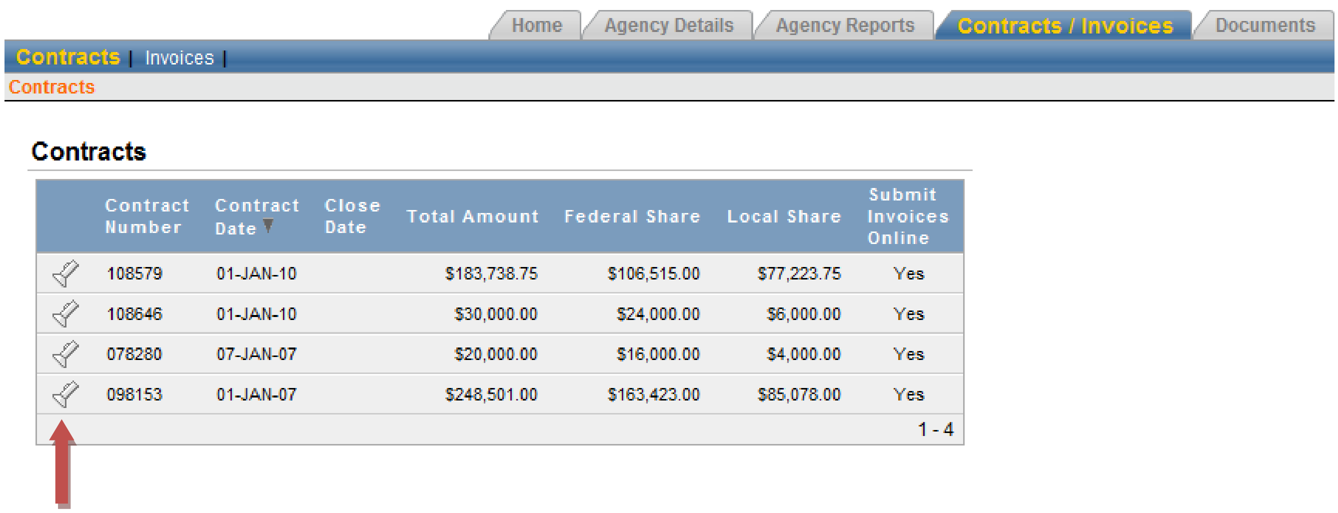
Performance Measure	Response
Number of customer contacts	1358
Number of one-way trips	1125
Identify targeted passenger demographics	elderly and people of low income needing assistance.......
Lessons learned	This is the box for the lessons learned for this reporting period.

The user will be required to provide a response to each individual Performance Measure.

Agency Contracts and Online Invoicing

All agencies enter into contracts with PTT which govern the implementation of the FTA funding programs. The **Contract / Invoices** main tab is visible to Agency Administrator and Agency Program Manager user types. This tab gives the user access to see details about their contracts and invoices against those contracts.

Contracts



	Contract Number	Contract Date	Close Date	Total Amount	Federal Share	Local Share	Submit Invoices Online
	108579	01-JAN-10		$183,738.75	$106,515.00	$77,223.75	Yes
	108646	01-JAN-10		$30,000.00	$24,000.00	$6,000.00	Yes
	078280	07-JAN-07		$20,000.00	$16,000.00	$4,000.00	Yes
	098153	01-JAN-07		$248,501.00	$163,423.00	$85,078.00	Yes
							1 - 4

The **Contracts** sub-tab under the **Contracts / Invoices** main tab shows a report of all of the agency contracts. This report provides the contract number, contract date, contract close date, total amount, federal share, local share and whether the agency is allowed to submit online invoices for the contract.

To see details about the contract lines click on the flashlight icon on the left of the line for which you want to see the details.

The Contract Detail page will show you each contract line item and the amounts for that line item as shown in the illustration below.

Contracts | Invoices |

Contracts > Contract Details

Contract Details

Return

Contract Num: 108579

Contract Date: 01-JAN-10

Contract Complete: No

Contract Line Items

Line Num	Mod Num	Description	Fund Type	Total Amount	Federal Amount	Local Amount
1		Bus Shelter	Capital	$12,000.00	$9,600.00	$2,400.00
2		Operating Assistance	Operating	$134,920.00	$67,460.00	$67,460.00
3		Project Administration	Project Admin	$36,818.75	$29,455.00	$7,363.75
						1 - 3

Invoices

The **Invoice** sub-tab under the **Contracts / Invoices** main tab will display a report of all of your agency's invoices, whether they were submitted online or manually submitted and entered by the PT Team.

Contracts | **Invoices** |

Invoices

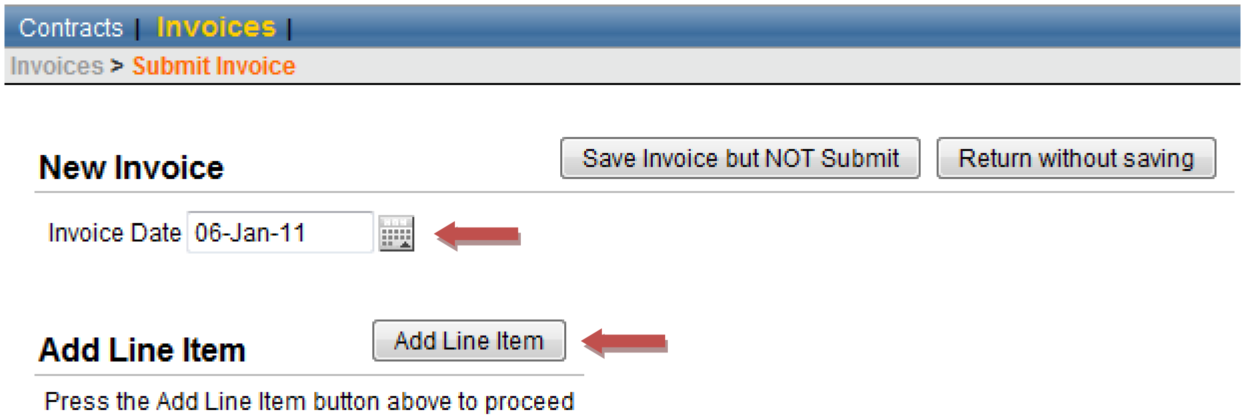
Agency Invoices

Submit a New Invoice

	Invoice Date	Total Amount	Federal Amount	Local Amount	Federal Amount Paid
	17-FEB-10	$102.98	$82.38	$20.60	$82.38
	17-FEB-10	$24,986.73	$15,068.91	$9,917.82	$15,068.91
	27-JAN-10	$27,937.01	$16,284.81	$11,652.20	$16,284.81
	16-SEP-09	$31,267.62	$17,750.19	$13,517.43	$17,750.19
	19-MAY-09	$37,923.05	$21,606.17	$16,316.88	$21,606.17
	03-MAR-09	$24,676.76	$13,358.00	$11,318.76	$13,358.00
					1 - 6

Download Spreadsheet

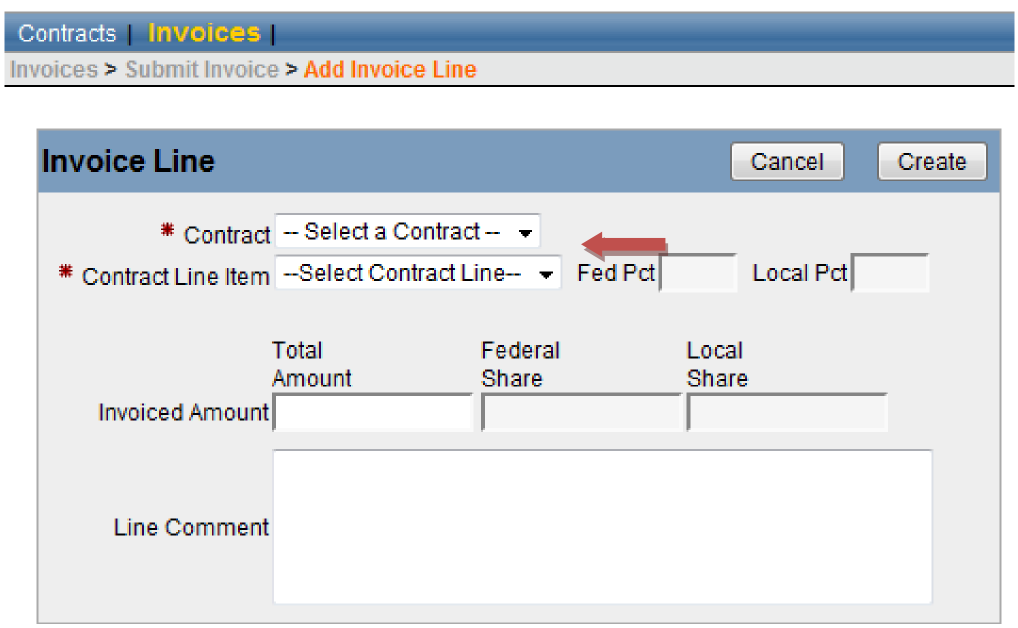
To submit an invoice online click on the **Submit a New Invoice** button, as seen in the illustration above, to start the process. If you do not see the button then you have not been authorized to submit invoices online. If this is the case and you would like to be able to submit invoice online talk to your PTT program manager.



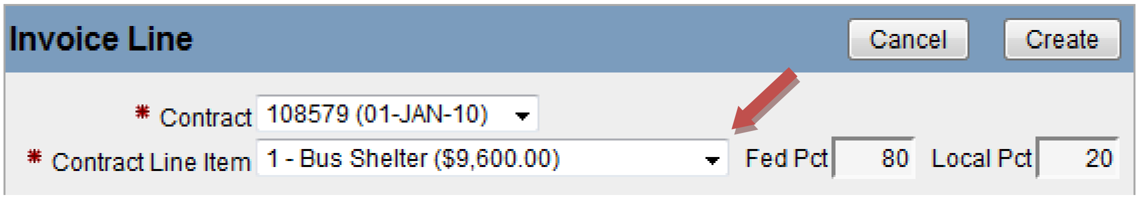
The invoice date will automatically be populated with the current date, if you want another date enter the date by using the calendar icon next to the invoice date field or by typing the date into the field in either the DD/MM/YY or DD-MON-YY date format.

Adding Invoice Lines

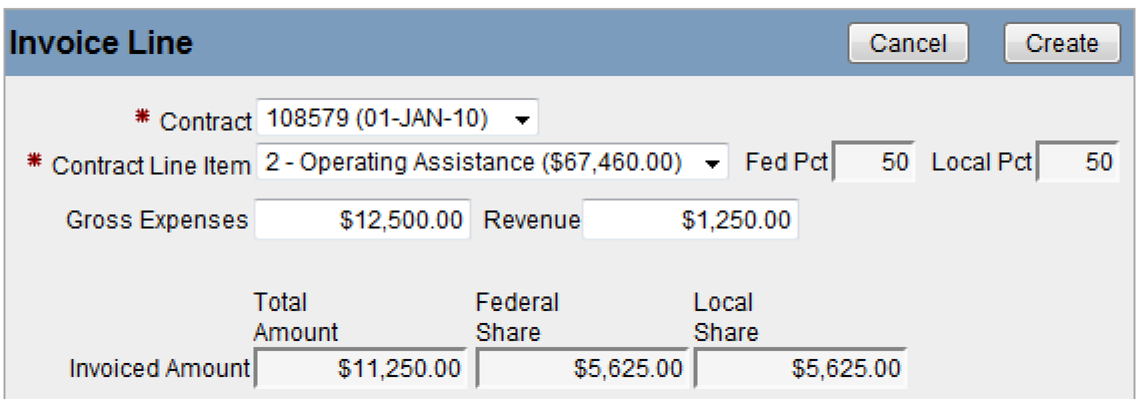
The next step will be to add one or more line items to the invoice. Do this by clicking on the **Add Line Item** button which will navigate you to the Add Invoice Line page as seen below.



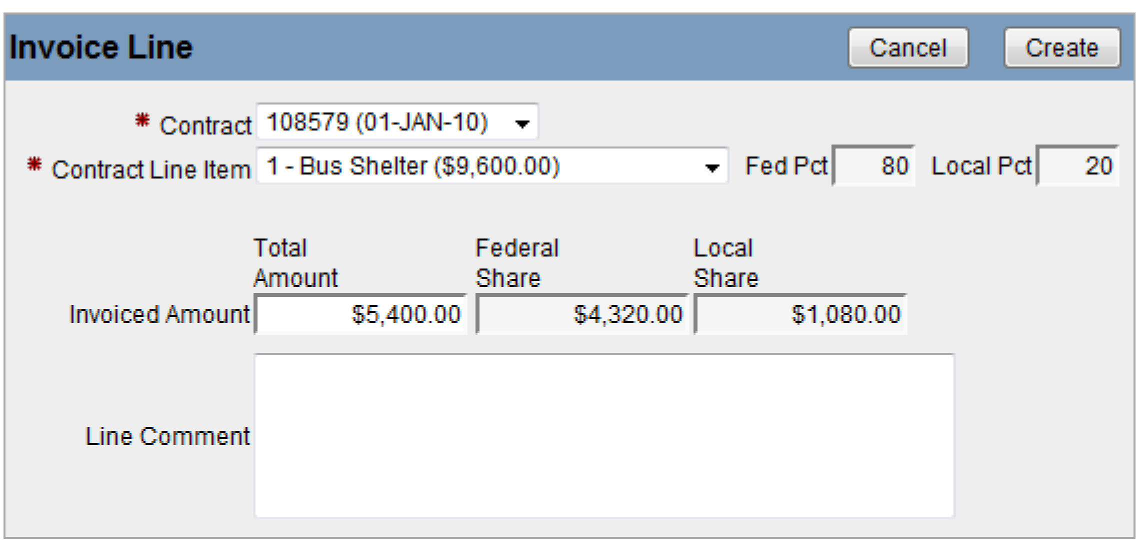
The first step is to select which contract you will be submitting the invoice against. This is done with the **Contract** select list field. Click on the small down arrow on the right side of the field to see a list of your active contracts. Once you select a contract the **Contract Line Item** select list will be populated with the available contract lines from the selected contract. Again use the small arrow on the right side of the Contract Line Item field to select the appropriate line. Once you select a line item the **Federal** and the **Local** Percentages will be populated.



If the line item is one that must be offset by revenues, the **Gross Expenses** and **Revenue** input fields will appear as seen below. For these type line items, enter the **Gross Expenses** and **Revenue** in **WHOLE** dollar amounts. Once entered the **Total Amount**, **Federal Share** and **Local Share** will automatically be calculated.

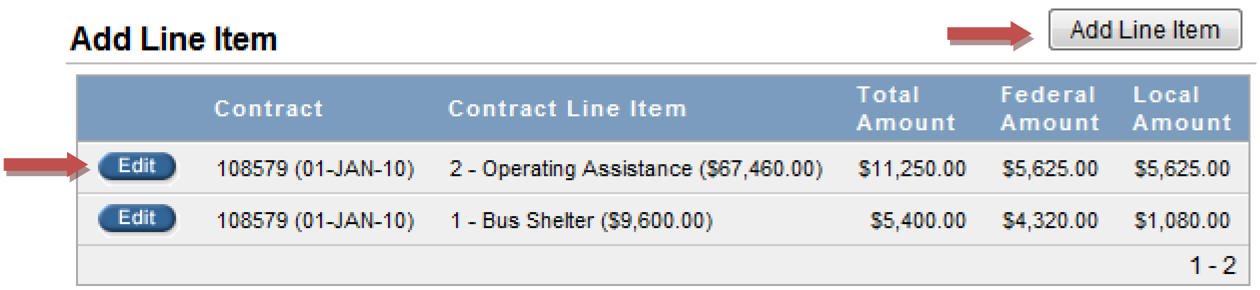


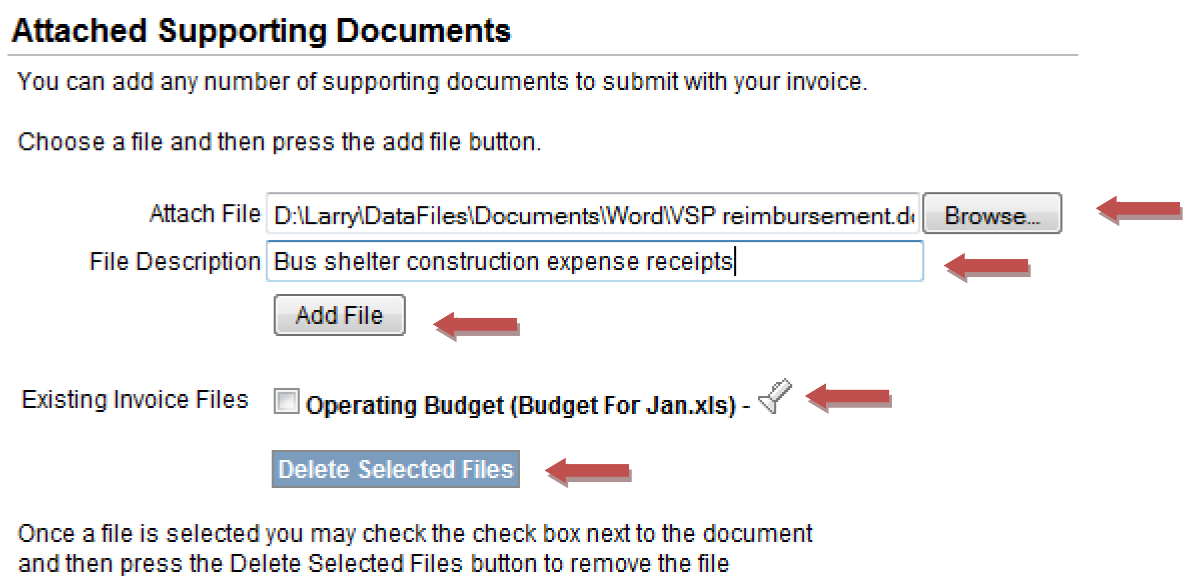
For all other lines enter the **Total Amount** and the **Federal Share** and **Local Share** will be calculated automatically.



You can enter a comment for the line if you desire. Note that you will be able to attach supporting documentation (such as a budget or pay receipts) in the next step. Click on the **Create** button when you are satisfied with your entries.

Add additional line items by clicking on the **Add Line Item** button. You can also go back and make changes or delete a line item off the invoice by clicking on the edit button for that line item.





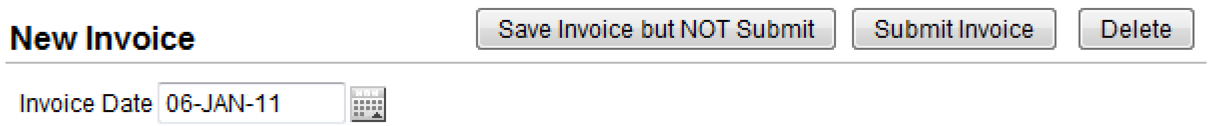
Supporting Documentation

Your contract may require you to submit supporting documentation with our invoices. You can add any number of files to a single invoice. The documents should be either MS Word, MS Excel or PDF file formats. Check with the PTT program manager if you have a file of another type to see if it can be accepted.

To attach a file click on the **Browse** button and select a file from your computer. Provide a short description in the **File Description** field and then click on the **Add File** button. The files that you add show up under the **Existing Invoice Files** list. You can delete an existing file by checking the box next to it and clicking on the **Delete Selected Files** button.

If you start an invoice but are not ready to submit the invoice you can click on the **Save Invoice but NOT Submit** button, then you will be able to return latter to do more work on the invoice prior to submitting the invoice.

Submitting the Invoice

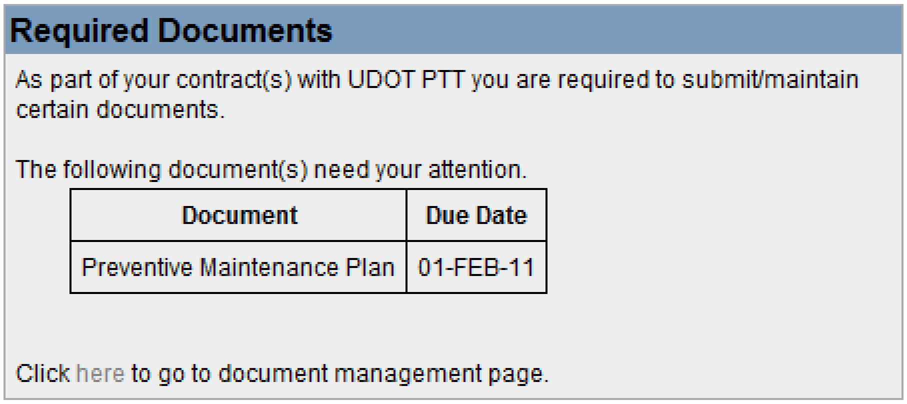


If you want to totally delete the invoice including all lines and all attached files you can click on the **Delete** button. When you are satisfied with the invoice and want to submit the invoice to PTT for payment click on the **Submit Invoice** button. Once you submit an invoice you will not be able to make any changes to the invoice.

Once the PT Team reviews your invoice they may return it to you for corrections or additions of supporting documentation.

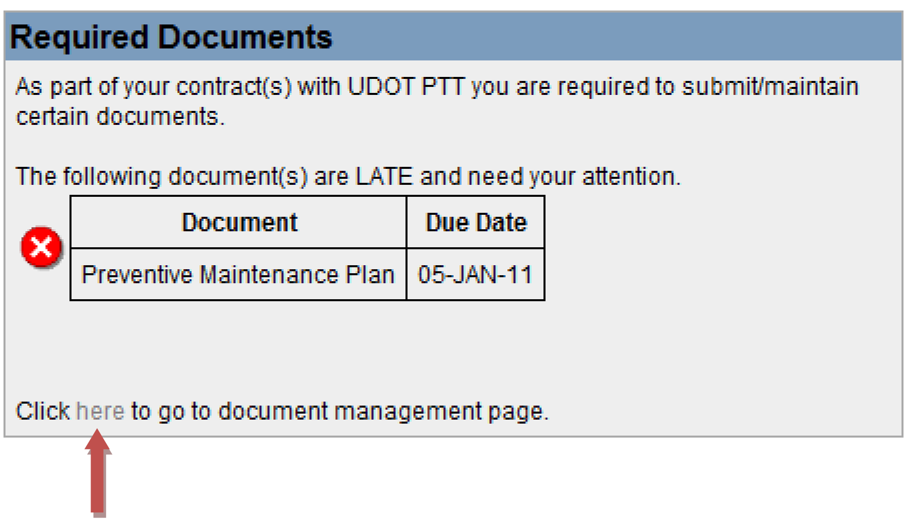
Agency Required Documents Procedures

If an agencies current contracts require the agency to maintain certain document the Agency Administrators and Agency Program manager user types will see a new report region on their home page.



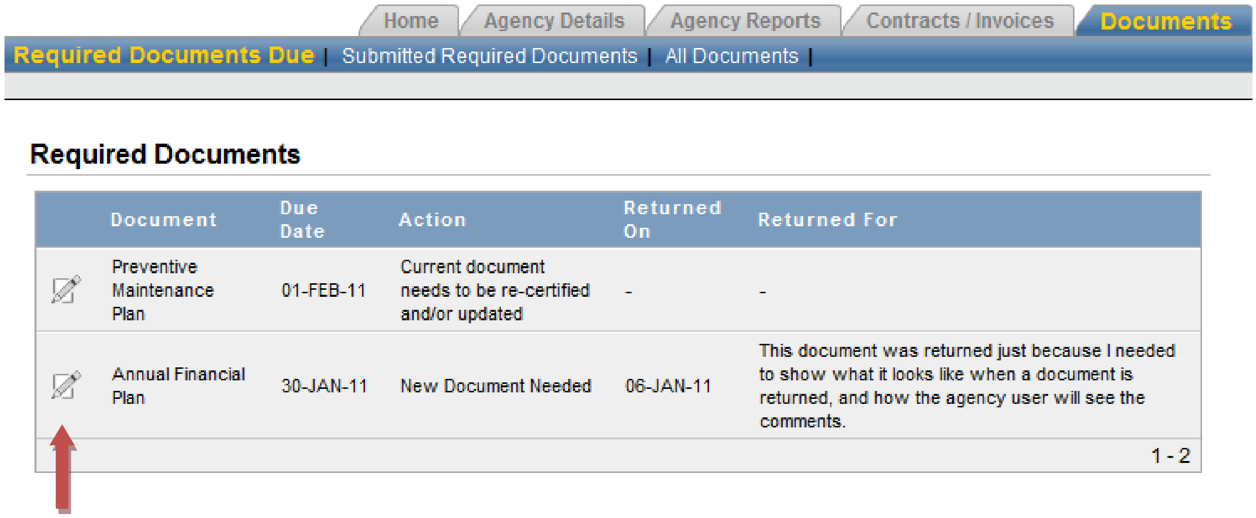
This region will indicate if there are any documents that require their attention. Certain documents may be required to be reviewed / submitted on an annual basis. The report will show the name of the document and the date by which the document should be submitted.

If the document is late or has been returned for corrections, it will be noted and an alert icon will be displayed to draw your attention to the issue.



To manage your documents you can click on the link at the bottom of the report to navigate to the Required Documents Due page. You can also navigate to this page by clicking on the new Documents main tab. Note, this tab is not visible to data entry user types.

Required Documents Due



	Document	Due Date	Action	Returned On	Returned For
	Preventive Maintenance Plan	01-FEB-11	Current document needs to be re-certified and/or updated	-	-
	Annual Financial Plan	30-JAN-11	New Document Needed	06-JAN-11	This document was returned just because I needed to show what it looks like when a document is returned, and how the agency user will see the comments.

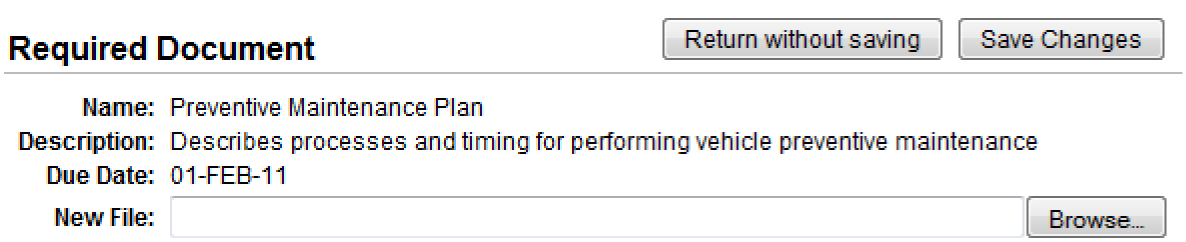
The report on this page will list all of the documents that are due and the action you must take. Depending on the document type and whether you have made any changes you will need to either.

- Submit a new document
- Certify that the previously submitted document is still current

To take the required action click on the icon on the left hand side next to the document name. This will navigate you to a page where you can select a file off of your computer to submit.

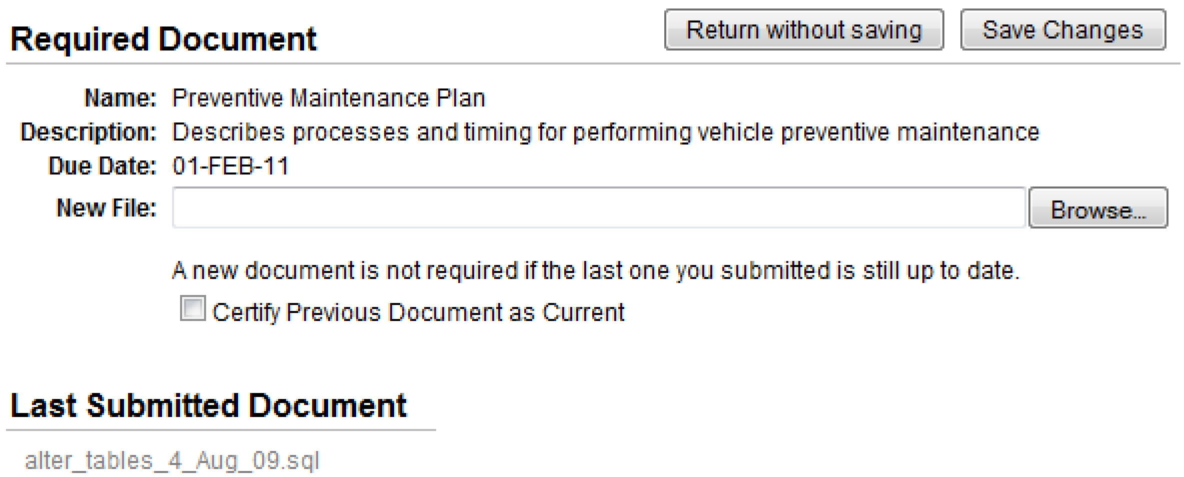
If a document was returned to your for corrections the user that submitted the document will receive an email indicating the document was returned. The email will contain the reason for return which is also shown on this report for returned documents.

If you must submit a new document the page will look similar to the illustration below.



A description of the document is provided. You may also be able to find more details about the document in the PTT Policy and Procedures Manual. To submit your document, select the file from your local computer or a network drive by clicking the **Browse** button. Then click the **Save Changes** button.

If you previously submitted the document and you are allowed to certify that it is still current the page will look similar to the illustration below


Required Document

Return without saving | Save Changes

Name: Preventive Maintenance Plan
Description: Describes processes and timing for performing vehicle preventive maintenance
Due Date: 01-FEB-11
New File: Browse...

A new document is not required if the last one you submitted is still up to date.
Certify Previous Document as Current

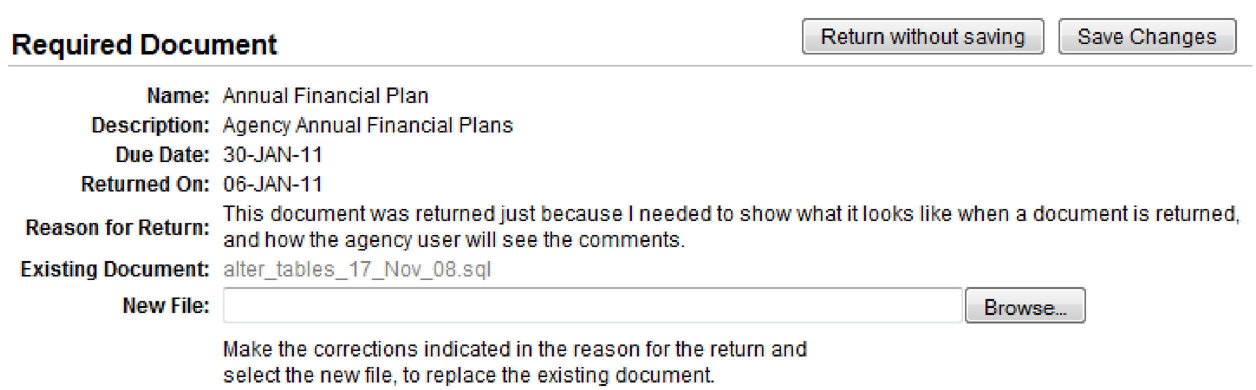
Last Submitted Document

alter_tables_4_Aug_09.sql

A link to your last submitted document is included at the bottom of the page. This allows you to download the document and review it to make sure it is still current. If the last document is still current all you need to do is check the box to **Certify Previous Document as Current** and then click on the **Save Changes** button.

If the previously submitted document is not current then select the new file from your local computer or a network drive by clicking the **Browse** button. Then click the **Save Changes** button.

If a document was returned to you for corrections the page will look similar to the illustration below.


Required Document

Return without saving | Save Changes

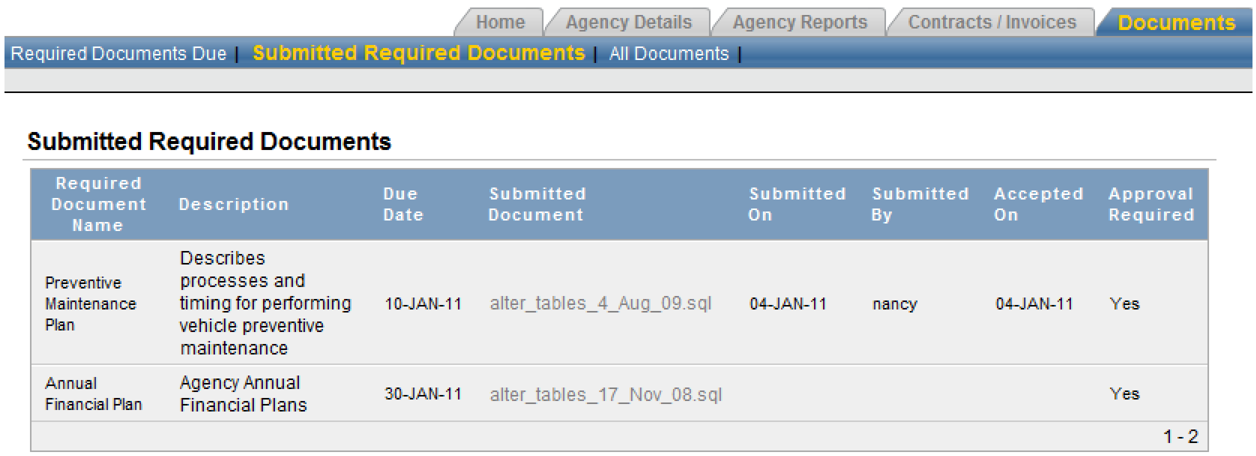
Name: Annual Financial Plan
Description: Agency Annual Financial Plans
Due Date: 30-JAN-11
Returned On: 06-JAN-11
Reason for Return: This document was returned just because I needed to show what it looks like when a document is returned, and how the agency user will see the comments.
Existing Document: alter_tables_17_Nov_08.sql
New File: Browse...

Make the corrections indicated in the reason for the return and select the new file, to replace the existing document.

The reason the document was returned is displayed and a link is provided so you can save the file that you previously submitted. Once you have made the necessary corrections, select the new file from your local computer or a network drive by clicking the **Browse** button. Then click the **Save Changes** button.

Submitted Required Documents

Another tab under the Documents main tab is the Submitted Required Documents tab, which will take you to a page where you can see a report of all of your previously submitted required documents. From the report you will be able to save/view any of the documents.



Home | Agency Details | Agency Reports | Contracts / Invoices | Documents

Required Documents Due | Submitted Required Documents | All Documents |

Submitted Required Documents

Required Document Name	Description	Due Date	Submitted Document	Submitted On	Submitted By	Accepted On	Approval Required
Preventive Maintenance Plan	Describes processes and timing for performing vehicle preventive maintenance	10-JAN-11	alter_tables_4_Aug_09.sql	04-JAN-11	nancy	04-JAN-11	Yes
Annual Financial Plan	Agency Annual Financial Plans	30-JAN-11	alter_tables_17_Nov_08.sql				Yes

1 - 2

All Documents

The page under the All Documents sub-tab under the Documents main tab will allow agency users to view all documents associated with their agency. This would include documents from contracts, applications, inspections and more. This page is currently under construction, but look for it soon.